

# How do I enroll a client/household into a program?

*This section discusses how to enroll a client and/or household into a program.*

Once you have determined the appropriate program for your client, the next step is the program enrollment process. For more information on program eligibility, please refer to the [program eligibility](#) section.

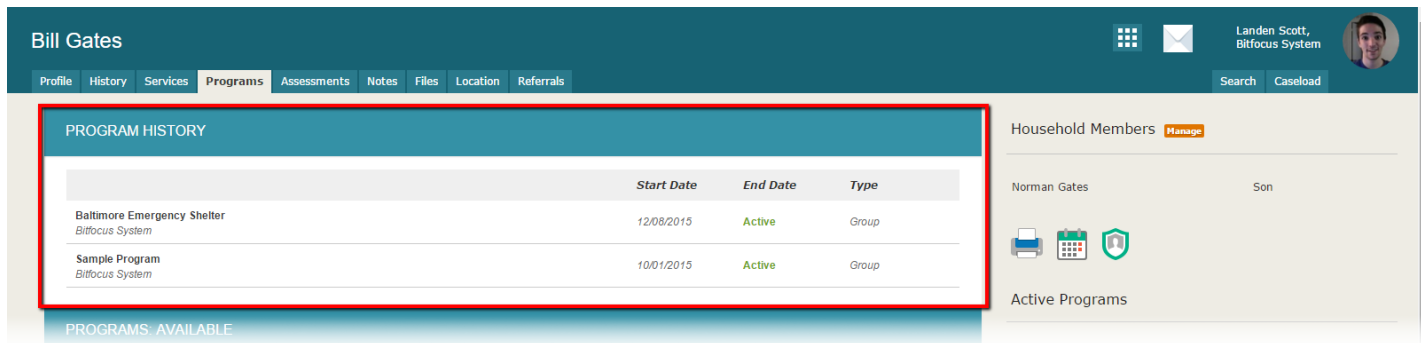
## Getting Started

To begin the program enrollment process, click on the Programs tab in the top menu of the client record. This area contains two sections:

- Program History
- Programs: Available

### Program History

This section provides a listing of programs your client is either currently enrolled in, or has been enrolled in in the past. In the example below, Bill Gates is currently enrolled in two programs: Baltimore Emergency Shelter program and the Sample Program. He is active in both programs, as indicated by the word “Active” in green font.



The screenshot shows the Bitfocus System interface for a client named Bill Gates. The top navigation bar includes tabs for Profile, History, Services, Programs, Assessments, Notes, Files, Location, and Referrals. The Programs tab is selected. The main content area is divided into two sections: Program History and Programs Available. The Program History section is highlighted with a red box and contains a table with the following data:

	Start Date	End Date	Type
Baltimore Emergency Shelter Bitfocus System	12/08/2015	Active	Group
Sample Program Bitfocus System	10/01/2015	Active	Group

The Programs Available section is currently empty. To the right of the Program History section, there is a Household Members section with a Manage button and a list of household members, including Norman Gates (Son). Below that is an Active Programs section.

### Programs: Available

Below the Program History section is the Programs Available section. This section lists current programs provided by your agency that are available for client enrollment. Bill Gates has numerous programs that are available to him.

Bill Gates

Profile History Services **Programs** Assessments Notes Files Location Referrals Search Caseload

Landen Scott, Bitfocus System

**PROGRAM HISTORY**

	Start Date	End Date	Type
Baltimore Emergency Shelter <i>Bitfocus System</i>	12/08/2015	Active	Group
Sample Program <i>Bitfocus System</i>	10/01/2015	Active	Group

**PROGRAMS: AVAILABLE**

- Baltimore Housing Assistance RETIRED (HPRP) ▼
- Homeless to Home TH Program Transitional Housing ▼
- Housing Status Testing Services Only ▼
- Jenn TH test Transitional Housing ▼
- Natalie: test hh program Other ▼
- Permanent Supportive Housing Program PH - Permanent Supportive Housing (disability required) ▼
- Sanctuary Emergency Shelter Emergency Shelter ▼

Household Members Manage

Norman Gates Son

Active Programs

Baltimore Emergency Shelter

Sample Program

Recent Services

Housing:

Hot Meal:Hot Meal Dinner








Assigned Staff

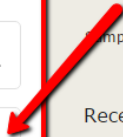
To enroll a client/household into a program, select the down arrow next to the applicable program title under “Programs: Available”.

PROGRAM HISTORY

	Start Date	End Date	Type
<b>Baltimore Emergency Shelter</b> <i>Bitfocus System</i>	12/08/2015	Active	Group
<b>Sample Program</b> <i>Bitfocus System</i>	10/01/2015	Active	Group

**PROGRAMS: AVAILABLE**

- Baltimore Housing Assistance RETIRED (HPRP) 
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- Sanctuary Emergency Shelter Emergency Shelter 



After selecting the down arrow, the section will drop down, providing additional information and options. Each is discussed below:

## PROGRAM DESCRIPTION:

Transitional Housing Helping clients to transition from Homeless to having a home. Several services to help clients get back to having permanent shelter

## Active Clients



30 % Families  
70 % Individuals

## Occupancy (Today)



2 % Checked In  
98 % Available



## Funding Source

N/A

## Service Categories:

 Food

 Housing

## HOUSING AVAILABILITY:

▶ H2H Transitional Housing: Individual	30 Beds
▶ H2H Transitional Housing: Family	30 Beds in 5 Units
▶ Sanctuary Emergency Shelter: Individual Bed	50 Beds
▶ Sanctuary Emergency Shelter: Family Beds	100 Beds in 10 Units

### a. Program Description

The program description provides a brief overview of the program, typically including the target population(s) and general service(s).

### b. Program Type

This indicates the program type (e.g. Transitional Housing, Emergency Shelter, etc.).

### c. Service Categories

This section indicates the categories of the different services this program provides (e.g. [APR] Transportation, [QPR] Rental Assistance).

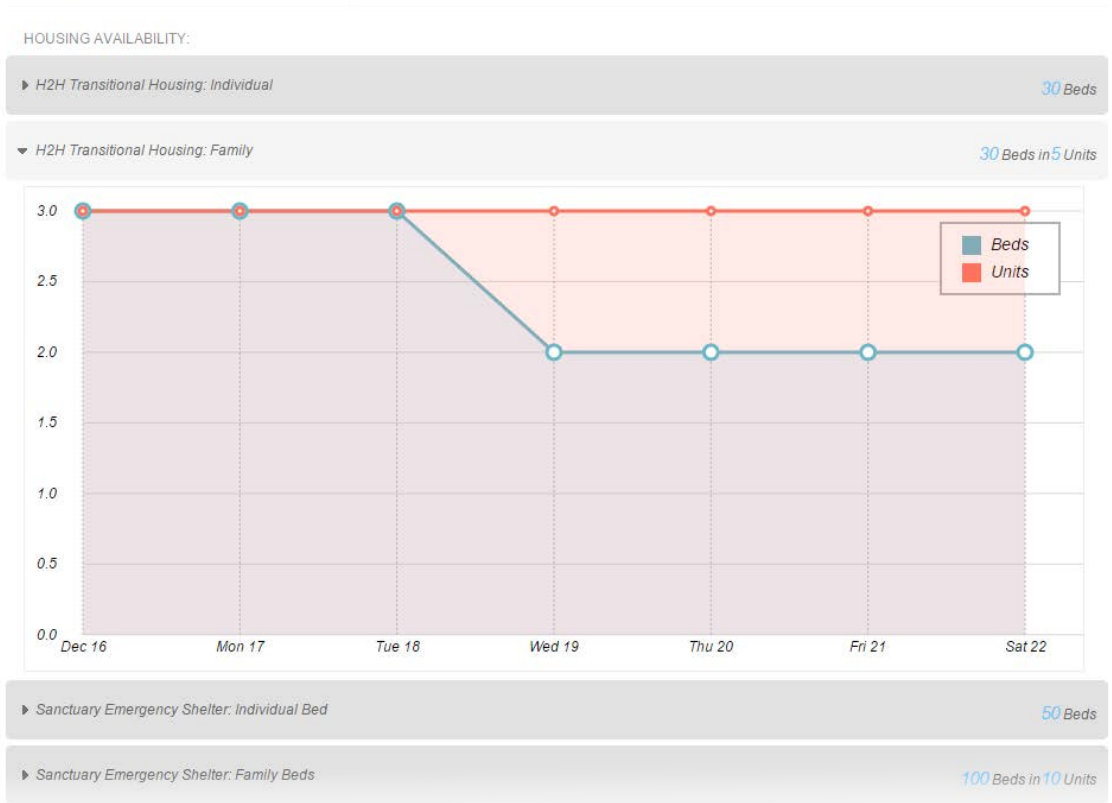
### d. Housing Availability

This section indicates the type and amount of housing available, should housing be applicable to the program. If you select the arrow, a graph will drop down, indicating how many beds and units are currently available.

The screenshot shows a web interface with the following sections:

- Funding Source:** N/A
- Service Categories:**  Food,  Housing
- HOUSING AVAILABILITY:**
  - H2H Transitional Housing: Individual (30 Beds)
  - H2H Transitional Housing: Family (30 Beds in 5 Units)
  - Sanctuary Emergency Shelter: Individual Bed (50 Beds)
  - Sanctuary Emergency Shelter: Family Beds (100 Beds in 10 Units)
- Include group members:**
  - Norman Gates (Son)

For programs with family housing options available, there will be two columns: Beds and Units (see below). Beds correspond to the number of individual persons in beds. Units correspond to the number of units available. This is particularly useful when enrolling households with children.



**e. Group Member Enrollment Option**

If your client is part of a household/family, you will be automatically prompted to select family/household members to include in the program. It is important to note that family/household members should be previously grouped with your client. For more information on creating groups, please see the [Working With Clients](#) section of the help portal. Check the box(es) next to the family member(s) who should be enrolled in the program.

Bill Gates

Profile History Services **Programs** Assessments Notes Files Location Referrals Search Caseload

Funding Source: N/A

Service Categories:  Food  Housing

HOUSING AVAILABILITY:

- H2H Transitional Housing: Individual 30 Beds
- H2H Transitional Housing: Family 30 Beds in 5 Units
- Sanctuary Emergency Shelter: Individual Bed 50 Beds
- Sanctuary Emergency Shelter: Family Beds 100 Beds in 10 Units

Include group members:

Norman Gates Son

Print Directions Doc Requirements Enroll

Housing Status: Training

## f. Referral Checkbox

If the program enrollment is conducted as a result of a referral, a checkbox will appear:

HOUSING AVAILABILITY:

- [CMHA Training] Attendance Service: Training 15 Beds in 15 Units

1 pending referral(s). Oldest 0 days.

Program Placement a result of Referral provided by Bitfocus System

Include group members:

Norman Gates Son

Print Directions Doc Requirements Enroll

Selecting the checkbox will make the system automatically include the referral in the client's Program History. This allows users to easily identify whether a program placement is due to a referral.

Bill Gates

Profile History Services **Programs** Assessments Notes Files Location Referrals Search Caseload

Release Of Information is Missing. Please add one to ensure compliance ([Click here](#))

PROGRAM: TRANSITIONAL HOUSING

Enrollment History Provide Services Assessments Goals Notes Files Forms End

**Program Service History** [Link from History](#)

Service Name	Start Date	End Date
Referral: Transitional Housing Bitfocus System referral to [ANNA] Report Testing Agency	12/22/2015	12/22/2015

1 DAYS ACTIVE PROGRAM

Program Type: Group (2)  
 Program Start Date: 12/22/2015  
 Assigned Staff: Landen Scott  
 Head of Household: Bill Gates

Program Group Members

Norman Gates 12/22/15 **Active**

Status Assessments

### g. Print Directions

Selecting the “Print Directions” icon will allow you to print directions to the program site from your current location or an alternate location. These directions can be programmed to be by car, foot, bicycle, or bus

### h. Print Checklist

Selecting the “Print Checklist” icon will allow you to print a checklist of all required documents that the client needs to enter the program.

### i. Enroll

After clicking Enroll, you will be taken to the Program Enrollment page for your *original* client. This page will present program specific data elements necessary to complete program enrollment.

**\*\*NOTE:** If you are enrolling other household/family members, there will be a “Save and Next” button. Selecting this will enroll the current member, and automatically take you to the correct program enrollment screen for the next member.



**Enroll Program for client Bill Gates**

Program Entry Date

Test Label

Pregnancy Due Date

Date of Lease

Prior State

[Save & Close](#) or [Cancel](#)

[Log](#)

**ENROLLING PROGRAM**

Program Type: Individual

Assigned Staff:

Head of Household:

**Program Group Members**

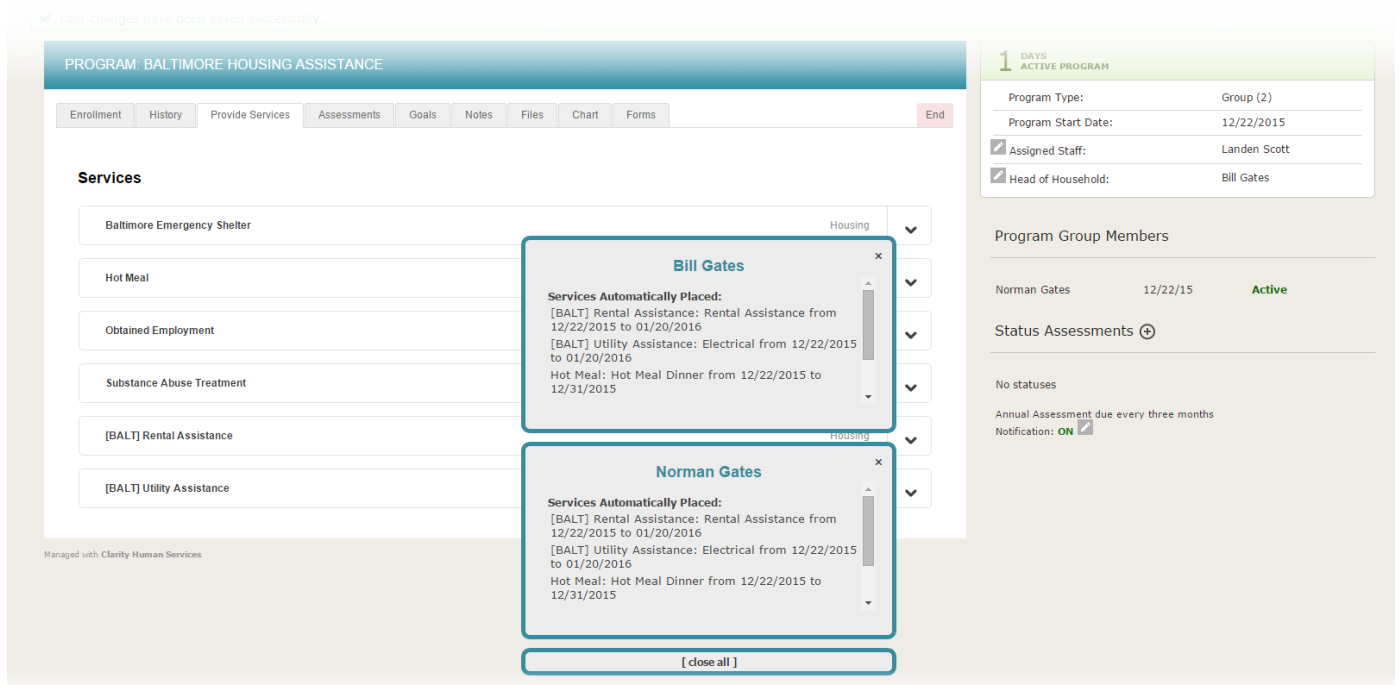
No active members

Managed with Clarify Human Services

Enrolled group members will be listed in the right side bar under “Program Group Members”.

## Group Enrollment & Summary of Actions

When enrolling members of a household, a Summary of Actions popup will appear (after the last household member is enrolled) if your System Administrator has configured Automatic [Program Goals](#) or Automatic Service placement. This scrollable page lists each program member (from the household) along with a list of all actions that were conducted automatically upon enrollment.



NOTE: This feature also applies to individual enrollment.

## Working With Dynamic Data Fields

The dynamic intake forms powered by Clarity provide many flexible features. Individual data elements can be Required, Soft Required or Not Required.

NOTE: As you enter client information into a program enrollment screen, some data fields may already be completed. This is because the Clarity Human Services System will automatically enter any client information that is common across programs (if the System Administrator has configured the program enrollment screen accordingly). If any autofilled information is no longer current, simply change the information. These changes will be automatically applied to other programs as well as any subsequent program enrollments.

### Required:

The data element must be completed, not allowing you to save the page unless a value is set. A red banner is set across the top of the page, and the data element is outlined in red.

### Soft Required:

The data element is optional, but highly recommended. The data will save and allow you to continue, but a yellow banner will appear, and the field in question will be outlined in yellow.

**Not Required:**

The data element is requested as part of the form, but is completely optional for data entry. No notice is provided.

As you complete data intake, you may be presented with dynamic data elements. For example, clicking “Yes” to Veteran Status will automatically expand the form to display additional Veteran questions, or setting your client to Female will display an additional Pregnancy question. These types of example questions are completely custom to each implementation, but standard data entry rules as stated above will apply.

Complete all necessary fields, and click “Save & Next” at the bottom of the page to create the client enrollment. If you have selected additional family/household members to include, you will be presented with an enrollment form for each client.